

Charter Renewal Guidebook

Charter Renewal is the process of renewing the charter agreement between the BSA and your charter organization, and renewing the registration of youth and adult members. Every unit must recharter annually.

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2018 Calendar

Late October

- Key 3 will receive login information by email

November

- Thursday, November 1
Online Rechartering Starts

December

- Friday, December 14
All recharterers due and received at council office



Rechartering

The purpose of this Guidebook is to help you through the recharter process and to ensure successful on-time rechartering. Your Unit Commissioner is here to help.

IMPORTANT INFORMATION

- All adults seeking to become a leader or reregistering as a leader in the Boy Scouts of America (BSA) must complete Youth Protection Training (YPT). The course can be taken online at my.scouting.org. You must complete the YPT course every two years. For more information see Youth Protection Training on page 5.
- All youth over the age of 18 participating in either Sea Scouts or Venturing are required to fill out an adult application, sign a CBC disclosure form and complete Youth Protection Training in order to stay registered in their respective program.
- All Unit Charter Renewal Applications must be submitted on or before December 14, 2018.
- Any recharter not completed and received by December 14 will be prohibited from participating in Scouting activities until their unit charter is reinstated, and may require additional documentation.
- Recharter is defective if there are: missing documents and/or signatures, leaders without current Youth Protection Training, incorrect/blank entries, too few registered youth, missing required leaders, etc. Please fill out all applications completely.

While the basic rechartering process will continue to be essentially the same as it has been, the application submission deadline of December 14, 2018 is firm. We want to avoid the pitfalls of units running programs without essential BSA services and loss of liability protection for leaders and charter partners.

HOW TO GET STARTED

1. **Appoint a Charter Renewal Person (CRP):** The unit designates an adult member as the CRP who has knowledge of scouting terminology, familiarity with the day-to-day operations of their Scouting unit, and is proficient in computer and Internet use. This is NOT a good position to assign to a parent who is new to Scouting.
2. Please **use Google Chrome Internet browser** to access the online recharter program.
3. When you are ready to begin, click here <http://www.pacsky.org/UnitRecharterInstructions>, then scroll down and click the link to the BSA's National Recharter website.
4. Select REGISTER FIRST TIME USER (each year you are a first time user)
5. On the next screen enter the unit access code (codes change each year) that the Boy Scouts of America sent to your Unit Leader and Committee Chairman by email in late October, select the unit type and enter the four digit unit number.
6. Create a password as instructed (write it down) and click on REGISTER.
7. After logging in the first time, it is recommended to move to Stage 2 Step 1 and print a paper roster. Use this roster as the starting point for the recharter process.
8. Proceed with the Recharter process and complete the information requested on each screen. You can stop at any time, log off the system, and begin again where you left off by logging on as a returning user and reentering your access code and password.
9. Help and tutorial screens are available throughout the process that should answer most questions. More helpful tips can be found on page three of this booklet.

Note: Unit number should be entered as four digits. Add leading zeros if necessary. Example: Troop 81 should be entered as as 0081.

BEFORE beginning the Online Recharter process you will need to:

- Verify that all adults have Youth Protection Training valid through Jan 31, 2019.
- Review your roster and make changes on paper so you know what changes and additions need to be made on your charter and which BSA member applications to collect in order to complete the on-line rechartering. Please verify the accuracy of addresses and phone numbers and collect email addresses for all adult members.
- Collect completed Youth Applications for new Scouts and confirm that each application is signed by the parent and unit leader. Collect completed Adult Leader Applications for adults being added to your unit. The leader application must be signed by the applicant, the Committee Chairman, and the Chartered Organization Representative. Confirm that the Disclosure/Authorization page of the application has been signed and dated by the applicant.
- If you turn in applications one week before recharter to the Council Service Center, they will be on your roster before you begin, thus saving you time and effort.

Packs Rechartering with Lion or Tiger Adult Partners

- They will receive a BSA Member ID number but they are not considered "registered" leaders.
- Lion and Tiger Adult Partners are listed on the roster because they registered their son/daughter as a Lion or Tiger and these programs require each Lion and Tiger to have an Adult Partner. Lion and Tiger Adult Partners are NOT registered leadership positions. (An adult application has not been completed, a criminal background check has not been conducted, and a registration fee has not/will not be collected.)
- AN ADULT LEADER APPLICATION MUST BE SUBMITTED TO THE COUNCIL SERVICE CENTER if you have someone who is listed on your roster in the Lion or Tiger Adult Partner position and they are now going to register in a leadership role such as a Tiger Den Leader or a Lion Guide or move to a Den Leader or Assistant Den Leader role.

RECHARTERING TIPS FOR ALL UNITS

1. One week before starting online rechartering submit all new youth and adult applications to the Council service center. This will allow for an easier online experience and provide you with an up-to-date roster with which to work.
2. When you come to the choice to load a roster, the council roster is recommended over a unit's in-house roster. This catches all the people that have turned in applications, and loads the info the way the council system needs it.
3. For best results use Google Chrome (preferred) or Mozilla Firefox Internet browsers.
4. LOG ON AS A FIRST TIME USER WITH YOUR ACCESS CODE even if you did the charter last year. New Internet Recharter access codes are issued every year by email. Contact your District Executive or District Commissioner immediately if you did not receive one.
5. Disable your computer browser's "Popup blocker" to allow the recharter process to flow smoothly.
6. Please ensure you update or add adult leader and family email addresses for all members.
7. Do not type over an existing leader's record. Create a new record for new leaders. Attach a completed application for any new member. The new Adult Leader Application must be used as it contains two pages that must be signed by the adult.
8. A chartering organization that sponsors more than one unit MUST register the same Executive Officer and Chartered Organization Representative [COR] for all units. The COR pays a registration fee for only one unit and is a "multiple" (non-paying member) for any others. The COR must be complete Youth Protection and Position Specific Training. Changing a COR is seldom necessary and should only be done with the knowledge and guidance of the Charter Organization, District Commissioner, and your Unit Commissioner.
9. Ranks can only be updated through the BSA Internet Advancement system. Rank changes are not part of the rechartering process.

Tips 10–12 below are for Cub Scout Packs only.

10. Keep all Lion and Tiger Adult Partners on the roster. Exception: If you delete a Lion or Tiger youth, also delete his adult partner.
11. If a Lion or Tiger Adult Partner wishes to register in a paid membership position such as Den Leader, they must submit a completed adult leader application, including a signed and dated Disclosure/Authorization form, and complete YPT. The new adult leader application should be submitted directly to the Council service center, preferably one week before starting recharter (or with recharter application).
12. DO NOT delete the 5th Grade Webelos. Webelos transitioning to a troop will need to complete a youth application to join that troop and submit it to the Scoutmaster of that troop.

13. Once submitted online, you are almost done! Print all pages, obtain the required signatures on Page 2, attach completed applications for anyone listed on Page 1, and hand in at either [Service Center](#) with a check.
14. The preferred method of payment is online via credit card or e-check. If you must submit payment with your charter, you may do so by making one check payable to Pacific Skyline Council. If you have chosen to pay from your unit account, please verify funds before dropping off your recharter. You may verify funds by calling the Foster City office.

ENSURE ADEQUATE LEADERSHIP ENTRIES AND YOUTH ARE AVAILABLE

- Cub Scout Packs must have: Cubmaster (CM), Committee Chair (CC), Chartered Organization Representative (CR-may be dual registered as CC or MC), two Committee Members (MC) or one MC plus one Pack Trainer (PT), and at least one Den Leader (DL). Den Leaders cannot be dual registered in the positions listed above.
- Boy Scout Troops, Venturing Crews, Varsity Teams, and Ships must have one unit leader: Scoutmaster (SM), Crew Advisor (NL), Varsity Coach (VC) or Skipper (SK),

AND

- a Committee Chairman (CC), Charter Organization Representative (CR-may be dual registered as CC or MC), plus two Committee Members (MC). Scoutmasters and Assistant Scoutmasters cannot be dual registered as a Committee Member.
- Units must have 5 paid youth to recharter. Youth who are registered in multiple units do not count toward the 5 youth. Software will advise on these areas during online rechartering.

POSITION CHANGES AND NEW APPLICATIONS

- New Applications are not needed for position changes within a unit at rechartering.
- Returning Youth/Adults DO NOT need new applications.
- Multiple Registrations: An adult who paid a registration fee in another unit does not pay a registration fee in your unit. All adults must pay, or "primary", in one position. Youth members paid in one unit are not required to pay more than once. If a member is not paying in your unit, please note on the recharter paperwork which unit they are paying in.

FEES

Any new youth recruited in the fall MUST be registered with the council BEFORE BEGINNING the online recharter process. However, in the event you have NEW youth that you are adding to the charter please use the following prorated fees **IN ADDITION TO** the annual recharter fees. This will allow us to register these new youth before year end. Please verify that you have attached completed applications for all new youth being added to the charter.

November	December
\$8.25 Registration	\$5.50 Registration
\$3.00 Boys' Life	\$2.00 Boys' Life

Annual Fees to Recharter (February 1 through January 31)

- Youth and Adults (each) \$33.00 Registration (Packs: Do not collect for Lion or Tiger Adult Partners) + \$12 participant insurance fee
- \$12.00 Boys' Life
- Unit Insurance Fee: \$40.00 per unit

JOURNEY TO EXCELLENCE

YOUR UNIT'S SIGNED JOURNEY TO EXCELLENCE SCORECARD IS DUE WITH YOUR RECHARTER.

Scouting's "Journey to Excellence" is the BSA's council recognition program designed to encourage and reward success and measure the performance of our units, districts, and councils.

What Journey to Excellence Brings to Your Unit

1. A framework for planning the year.
2. A method for evaluating your unit.
3. Guidance in areas where you might do better.
4. Specific guidelines and standards of what is considered good performance.
5. Early warning of potential problem areas.
6. Recognition for good Scouting.
7. Benchmarking to get ideas and tips from other good units.

A part of the rechartering process is reviewing the JTE score. Where is your unit on your Journey to Excellence? Download your Pack, Troop or Crew JTE scorecard at <http://www.scouting.org/scoutsource/Awards/JourneyToExcellence.aspx>

YOUTH PROTECTION TRAINING

All registered adults must complete the BSA Youth Protection Training (YPT) course. An adult's Youth Protection Training must be valid at least until January 31, 2019.

- Units should conduct an inventory of adult leaders that need to complete YPT early in October. Notify the leaders that need to complete this training as soon as possible.
- All new adult applicants should complete the online YPT training and submit a copy of the completion certificate with the Adult Leader Application.
- Adults and youth over the age of 18 participating in Sea Scouts, Venturing, or Exploring must take YPT.

ANNUAL CHARTER AGREEMENT

The Annual Unit Charter Agreement defines the relationship between a chartering organization and the Pacific Skyline Council. This document must be signed by the same institutional head as listed on your charter, and your Chartered Organization Representative. Our office staff will sign for the BSA. Forms can be found here: https://filestore.scouting.org/filestore/membership/pdf/524-182_web.pdf

BE ON TIME and ERROR-FREE

12 Most Common Errors:

1. Page one is missing. Attach ALL pages of the printed charter.
2. Applications are not attached for youth or leaders listed as NEW on page one of the charter. FULLY COMPLETED APPLICATIONS MUST BE ATTACHED OR WE CANNOT PROCESS THE CHARTER. Applications are required for any new youth or leader listed on page one, for any adult previously registered as Lion or Tiger Adult Partner now registering in a leadership role, and for any currently registered 18-yr-old who is promoted to Assistant Scoutmaster or College Scouter Reserve. Scouts who are 18, but are registering as youth in Venturing, Sea Scouting or Exploring must complete an adult application.
3. Signatures are missing on page two of the charter. The Executive Officer (EO/IH) or the Chartered Organization Representative (COR) as listed on the charter papers must sign on the first signature line. This signature can be given electronically at the time you complete your unit recharter. If you do not do this electronically, a wet signature is required.
4. Signatures are missing from the applications that have been attached. Unit leaders and parents must sign the youth applications. The Applicant, Committee Chair and Chartered Organization Representative must sign the adult leader applications. Be sure initials are included on adult applications near the signature box.
5. Social Security Number is missing from Adult Leader Applications. This number must be provided for background checks, no exceptions.
6. The Disclosure/Authorization form is not attached with the adult leader application or is attached but not signed. This is a separate page before the applicant information.
7. The right-hand column of information is not filled in on the adult leader application, especially question 6.
8. The Chartered Organization is the same on the pack, troop and crew, but the Chartered Organization Representative is different from one unit to another. All units chartered to the same organization MUST list the same person(s) as the Executive Officer and Chartered Org Rep on all units. The COR only pays in one unit. Please indicate which unit the Chartered Organization Representative will pay in.
9. More than one position has been assigned to an adult leader, such as Committee Member. The Chartered Org Rep is the only position that can multiple either as a Committee Member or as the Committee Chair.
10. Check is not attached. Check needs to be submitted with the charter, payable to "Pacific Skyline Council."
11. The membership fee, Boys' Life fee, or insurance fee is not submitted. Remember: End-of-year fees for new members must be added to your total!
12. The Annual Charter Agreement and Journey To Excellence scorecard aren't submitted or properly signed.

STILL HAVE QUESTIONS ABOUT UNIT RECHARTERING?

Contact your District Executive:

- Discovery District - Zachary Brown, (650) 341.5633, zachary.brown@scouting.org
- Redwood District - Tom Kenney, (650) 341.5633, thomas.kenney@scouting.org
- Stanford District - Steve Smith, (650) 341.5633, stephen.smith2@scouting.org

SERVICE CENTER LOCATIONS

Foster City Service Center 1150 Chess Drive, Foster City, CA 94404 • (650) 341.5633 **Hours** Mon-Fri 9am-5pm
Palo Alto Service Center 1305 Middlefield Road, Palo Alto, CA 94301 • (650) 327.5900 **Hours** Tue-Sat 11am-6pm